Welcome to the Statistics of Income (SOI) Tax Stats Table Wizard!

The Tax Stats Table Wizard will enable you to design your own customized data tables.
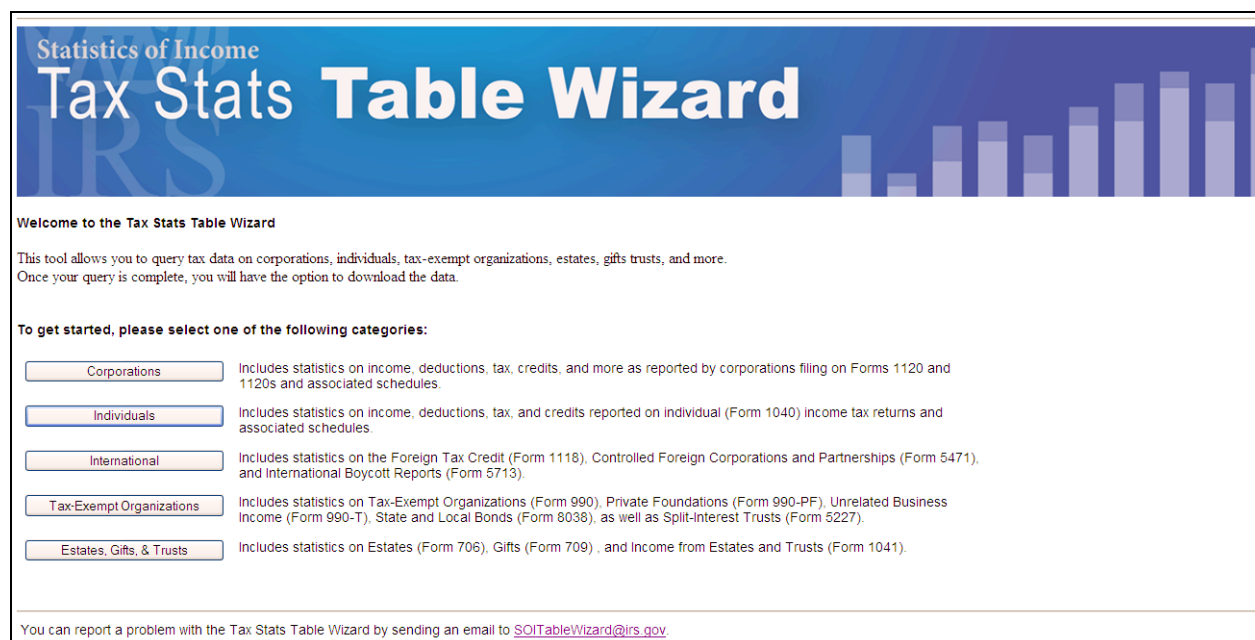
The data presented in the Tax Stats Table Wizard are the products of the Statistics of Income Division of the Internal Revenue Service. There are two types of data available. The first type is aggregated data, formatted to prevent the disclosure of private tax payer information. This formatting includes specific notations in the table which note the combination and/or suppression of certain data points. (These notations are explained in the table footnotes.) The second type is public-use microdata which are not subject to disclosure concerns.

You can report a problem with the Tax Stats Table Wizard by sending an email to SOITableWizard@irs.gov.

To create a customized data table, follow the step-by-step instructions below. (Please note, each category and dataset is unique, so the screen shots below may differ from those that appear on your screen. However, the instructions are still applicable.) A step-by-step example follows.

1. <u>Select a Category</u>

First, select the category of data you wish to explore.

SOI data are divided into five major categories:

- Corporations (Includes data from Form 1120 and 1120 S as well as related attachments)
- Individuals (Includes state and county migration data from Form 1040)
- International (Includes data on international partnerships and corporations)
- Tax-Exempt Organizations (Includes data on tax-exempt organizations, foundations, and trusts)
- Estates, Gifts, & Trusts (Include data on estate (Form 706), gifts (Form 709) and Income from Estate and Trusts (Form 1041)

2. Select a Dataset

Next, select a dataset from the drop-down box.

When you've selected the appropriate dataset, click on the "Go to Select Variables >>" button.

3. Select Grouping & Analysis Variables

Next, select the grouping and analysis variables.

The grouping variables, also known as class or categorical variables, will determine how the table output is organized. At least one Row Group Variable is required for all analysis; you may choose several. The Row Group Variable(s) will determine the group variable(s) used to divide the table horizontally. You will also have the option of selecting Column Group Variable(s) or a Page Group Variable, depending on the dataset you have selected. The Column Group Variable(s) will determine the group variable(s) used to divide the table vertically. The Page Group Variable will create a separate table for each value of the selected group variable.

The available group variables will vary depending on the dataset you choose; however, common options include calendar year, state and income class.

Next, select the analysis variables you wish to include in your table. Common analysis variables are dollar amounts or return counts. You may select a single variable or as many as 25. (To select multiple variables, hold the Ctrl key down while clicking additional values.)

Some data sets include a link at the top of this screen (under the "Select Variables From" header) which will open a new browser window with additional information regarding your chosen data set, including detailed definitions of variables.

When you've completed the variable selection, click on the "Go to Select Limits >>" button.

The "Start Over" button will return you to the dataset selection page for your category.

4. Select Limits

Next, select any limits or restrictions you would like to apply to your table. Any limits you select will constrain the results in the table to specific values of the grouping variables. You may choose a single limit, multiple limits (using the Ctrl key), or none at all.

Once you've selected your limits, your next step will be determined by the dataset you selected. Some datasets will allow you to select statistics by clicking the "Select Statistics >>" button. For those without this option, you can view your customized table using the "Get Results >>" button.

Also note that you may return to the previous section in which you selected your grouping and analysis variables using the "<< Change Variables" button.

5. Select Statistics (Not available for all datasets.)

You may select up to four statistics for each analysis variable you selected. The available statistics are:

- Sum (default)
- % of Total Sum
- % of Column Sum
- % of Row Sum

If you've selected less than five analysis variables, you will select statistics for each of the variables individually. If you've selected more than five analysis variables, you must select one set of statistics to apply to all analysis variables.

Once you've selected your statistics, the "Get Results >>" button will take you to your customized table.

Also note that you may return to the previous section in which you selected your grouping and analysis variables using the "<< Change Variables" button. You may return to the limit selection screen using the "<< Change Limits" button.

6. <u>View Results</u>

View the results of your customized table.

Notice, the table header includes information on the source table as well as any limits you set during the process.

You may export your table as a file. Simply select the file type you wish and click "Export." A pop up screen will appear asking if you wish to Open, Save, or Cancel the file download.
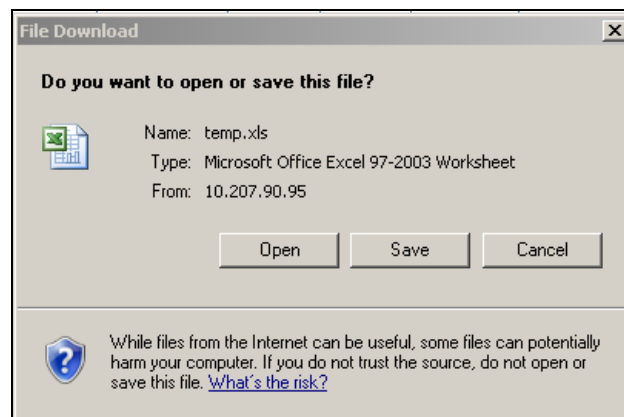
Additionally, some datasets will include an option to create a chart based on your customized table. Simple select a chart type (Pie, Bar, or Line) and click "Create Chart." You will then be instructed on how to build a chart based on your customized table.

Example:

For this example, we will answer the following question: *What is the number of returns filed and the total contributions received by 501(c)3 exempt organizations in the states of California and Florida for each of the years between 2005 and 2007?*

1. Select a Category

The Exempt Organization 501c(3) data is located in the Tax-Exempt Organizations category.

2. Select a Dataset

Reminder: For this example, we will answer the following question: *What is the number of returns filed and the total contributions received by 501(c)3 exempt organizations in the states of California and Florida for each of the years between 2005 and 2007*?

We select the Exempt Organization 501c(3) data set from the drop down box and click "Go to Select Variables >>".

3. Select Grouping & Analysis Variables

Reminder: For this example, we will answer the following question: *What is the number of returns filed and the total contributions received by 501(c)3 exempt organizations in the states of California and Florida for each of the years between 2005 and 2007*?

Based on our example data question, we have two grouping variables, File Year and State. We are required to select at least one Column Group Variable. In this case, we selected "File Year" as our Column Group Variable. We have the option of including "State" as an additional Column Group Variable or as a Row Group Variable. In this case, we selected "State" as a Row Group Variable. Our resulting table will be categorized vertically by File Year and horizontally by State.

In order to answer our example data question, we need only select two analysis variables: "Number of returns" and "Total Contributions Received." To select more than one variable, we held the Ctrl key down while clicking additional values.

If we had any questions about the Exempt Organization 501c(3) data set, we could click on the link at the top of the screen. This will open a new browser window with additional information on the data sets as well as detailed variable definitions.

Once we are done selecting variables, we click on "Go to Select Limits >>."

4. Select Limits

Reminder: For this example, we will answer the following question: *What is the number of returns filed and the total contributions received by 501(c)3 exempt organizations in the states of California and Florida for each of the years between 2005 and 2007*?

Given our example data question, we need to establish two limits: one for Filing Year and another for State. For Filing Year, we select the years "2005", "2006", and "2007". This will cause the 2004 data to not be included in the final table. For State, we select "California" and "Florida" which eliminates all the other states from the table.

When the limit selection is complete, we click "Go to Select Statistics >>" to continue.

5. Select Statistics

Reminder: For this example, we will answer the following question: *What is the number of returns filed and the total contributions received by 501(c)3 exempt organizations in the states of California and Florida for each of the years between 2005 and 2007*?

The Exempt Organization 501c(3) data set offers the option of selecting statistics. (Note: this option is not available for all datasets.)

While no additional statistics beyond "Sum" are required for our example, we've selected an additional statistic of "% of Total Sum."

Once the proper statistics have been selected we click on "Get Results >>."

6. <u>View Results</u>

The Table Wizard now displays your custom table:

Statistics of Income
Tax Stats Table Wizard
IRS

<u>Source Data: Exempt Organizations 501c(3) (Form 990)</u>
All figures are estimates based on samples -- money amounts are in thousands of dollars.
        FILE YEAR: 2005 / 2006 / 2007
SIZE OF TOTAL ASSETS: ---all---
            STATE: CALIFORNIA (CA) / FLORIDA (FL)
        NTEE CODE: ---all---

Source Data: Exempt Organizations 501c(3) (Form 990)	File year											
	2005				2006				2007			
	Number of returns		Total Contributions Received		Number of returns		Total Contributions Received		Number of returns		Total Contributions Received	
	Sum	% of Total Sum	Sum	% of Total Sum	Sum	% of Total Sum	Sum	% of Total Sum	Sum	% of Total Sum	Sum	% of Total Sum
State												
California (CA)	27,063	23.20	32,292,888	22.79	28,411	24.36	34,232,501	24.16	30,517	26.16	34,950,433	24.66
Florida (FL)	9,990	8.56	13,398,497	9.45	10,714	9.18	13,050,411	9.21	9,957	8.54	13,793,192	9.73

Select Export File Type: Select Chart Type:
◉ XLS
○ CSV   ◉ PIE
○ RTF   ○ BAR
○ PDF   ○ LINE
| Export | Create Chart |
| << Change Variables | << Change Limits | << Change Statistics | | Start Over |

<u>Return to Welcome Page</u>   <u>Return to Tax Stats</u>

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A few things to note:

- The table header includes information about the data set you selected as well as the limits established during the process.

- Our "Column Grouping Variable" of File Year is visible along the top of the table.

- Our "Row Grouping Variable" of State is visible along the left side of the table.

- A column was created for each of the statistics we selected.

- Using the buttons at the bottom of the screen, we have the option to export our table in a number of formats as well as to create a chart based on our customized table.